

Defining Quality for Peace Country Agriculture:

A Strategic Approach to Global Competition

In Partnership With



Northern
Alberta
Development
Council



NORTH PEACE
ECONOMIC
DEVELOPMENT
COMMISSION



Foreign Affairs and
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Agri-Food Canada

Agriculture et
Agroalimentaire Canada

April 2009

Defining Quality for Peace Country Agriculture

Research Series Proposal

Branding the Peace Country Association is a unified voice that is dedicated to proving the Peace Country's northern growing advantages to the benefit of, and the advocacy for the Region's agricultural industry.

It's in Everything We Grow!

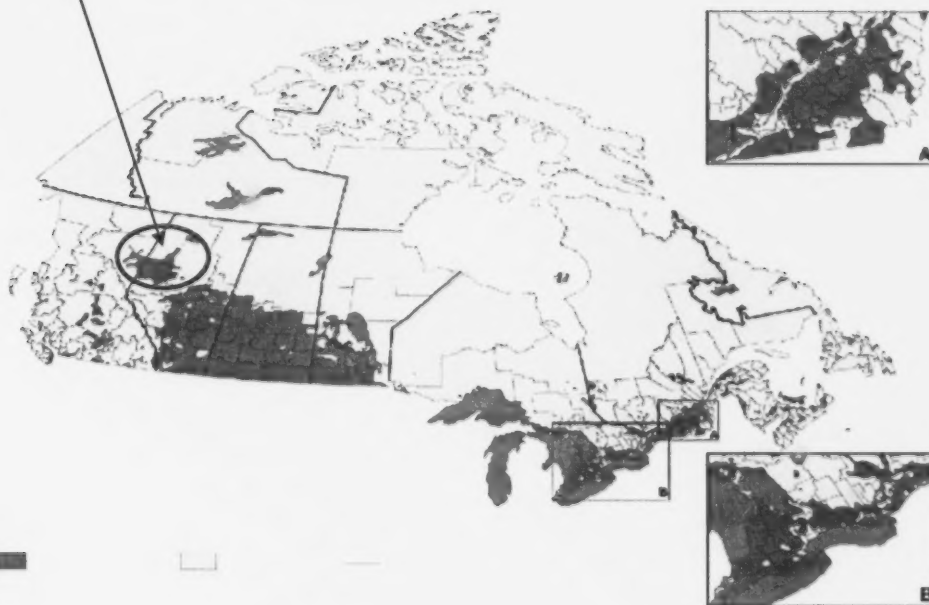
Research Series Purpose: Identify, define and substantiate the "superior quality" claims associated with the northern growing advantage for agricultural commodities grown in the Peace Country.

Research Series Application: The information presented in the proposed series of research projects will be used by Branding the Peace Country to design and implement advocacy campaigns that: 1) showcase the superiority of Peace Country agricultural to buyers (local, national, international); 2) increase the negotiation power of Peace Country producers to these buyers; 3) encourage Peace Country producers to invest in high quality free market crops; 4) identify alternative niche markets; 5) support the Peace Country's demands for reliable, affordable transport systems that enhance direct to the buyer transactions; 6) promote the creation of an "ingredient tracing system" for consumer foods claiming "Product of Canada" status.

Research Methods: Information for the research projects within this series will be collected from municipal "quality" studies; provincial agricultural research studies; producers who have conducted "quality" analyses; and foundation chemical/nutritional/growing analyses conducted in partnership with the Alberta Research Council. As baseline information contributing to a global positioning advantage for Peace Country agriculture, provincial, national and international agricultural competitors will be reviewed and compared (when possible) to the outcomes found for the Peace Country.

Branding the Peace Country – Background

Located across the corners of Northeast British Columbia and Northwest Alberta, Canada's Peace Country is nestled in a valley on the northern foothills of the Rocky Mountains. The Peace Country is the most northern agricultural industry oasis in the world. The region is blessed with the unique growing combination of a northern climate, fertile soils, and a watershed system fed by glacial run offs. Though only five percent (5%) of the total agricultural land in Canada, the Peace Country has become internationally renowned for the high quality of its agricultural products.



The potential of a unified strategy that leverages off the Peace Country's northern growing advantages for select agricultural products was realized over 10 years ago by a group of Peace Country grain farmers. Brainstorming over kitchen tables on how to negotiate this northern advantage into premium prices, the concept of a regional marketing association was borne. This marketing association is now referred to as Branding the Peace Country (BPCA). Incorporated in 2004, BPCA; which originated as a multi-industry, membership based initiative; set out to identify, promote, and advocate for all differentiating characteristics of the Peace Country (agriculture, tourism, visual arts, music, oil & gas, forestry, etc..)

In 2006, BPCA was granted three years of operational funding from the Agriculture Opportunity Fund (Alberta) and the Northern Development Initiative Trust (British Columbia). With operational funding secured, BPCA elevated from a team of volunteer member-leaders to one that had dedicated human resources promoting BPCA's mandate and membership recruitment model. In the background, while BPCA was actively promoting and delivering its projects and services across the diversity of member industries there was also something else happening. Something that would prove to have far greater impact to reaching the goal of differentiating the Peace Country on the global stage!

In the background BPCA was also researching, strategic planning, **AND** paying very close attention to emerging food industry and consumer food trends. During its three-years of operational grant security (April 1, 2006 to March 31, 2009), BPCA invested in three research papers – all funded in part by the *Department of Foreign Affairs and International Trade - Canada*. These three research papers: 1) Foreign Direct Investment Revisited (2007); 2) Transporting Peace Country Grain to Export Position (2008) ; and 3) Evaluation of Omega3 Levels of Peace Country Flax (2009) - collectively clarified that **the Peace Country's northern advantage is first and foremost associated with agriculture**. In March 2009, BPCA recommitted to its original purpose – to promote and advocate for premium prices for the agricultural commodities grown in the Peace Country.

Peace Country Agriculture

As shown in Table 1, the Peace Country has over 3.8M hectares (equal to 9.3M acres) dedicated to farmland; 45% of which is used for the production of field crops. Of the ten major field crops grown in the Peace Country, more than 75% of the farmland dedicated goes to four crops: canola, wheat, alfalfa, and hay.

Table 1: 2006 Canada Peace Country Principle Field Crop Hectares – By Municipality

AB – PC	Canola	Alfalfa & Mixes	Wheat	Tame Hay	Barley	Oats	Forage Seeds	Field Peas	Flax	Rye	Total HA
NRT. Sunrise	22,667	10,214	17,170	20,287	1,871	2,049	4,934	1,229	0	0	80,421
Big Lakes	7,141	19,690	5,618	23,987	6,409	6,739	0	0	0	330	69,914
Lesser Slave	738	5,612	770	4,671	1,016	2,319	0	0	0	0	15,126
Clear Hills	22,392	19,042	10,113	21,037	10,894	11,125	8,487	3,416	0	0	106,506
NRT. Lights	31,053	24,209	24,052	18,014	13,060	7,729	4,085	2,608	952	279	126,041
Mackenzie	40,728	21,424	26,728	7,214	5,425	8,648	1,986	4,923	548	155	117,779
Greenview	15,778	26,349	15,025	30,546	5,772	12,924	6,479	1,538	0	152	114,563
Grande Prairie	49,610	49,061	35,918	27,744	29,528	14,890	11,396	4,939	223	243	223,552
Smoky River	76,506	34,412	53,112	6,450	7,791	8,273	7,953	3,867	1,813	0	200,177
Birch Hills	45,606	16,323	36,267	4,170	11,748	4,270	5,681	1,579	128	0	125,772
Spirit River	15,417	6,759	16,488	3,784	2,119	2,214	2,923	821	0	0	50,525
Saddle Hills	23,709	22,208	25,367	20,306	6,416	13,199	12,365	1,808	0	292	125,670
Fairview	25,050	8,988	18,646	4,745	8,490	4,835	4,964	2,908	185	71	78,882
MD Peace	13,511	7,604	14,982	4,824	3,594	2,731	1,010	2,838	190	0	51,284
Unspecified	0	210	0		0	0	1,398	1,112	347	329	1,998
AB – PC	389,906	272,105	300,256	197,934	114,133	101,945	73,661	33,586	4,386	1,851	1,488,210
BC-PC	Canola	Alfalfa & Mixes	Wheat	Tame Hay	Barley	Oats	Forage Seeds	Field Peas	Flax	Rye	
PR-B	3,347	33,944	4,268	40,103	5,418	10,808	20,803	1,080	0	0	119,771
PR-C	0	5,643	1,966	4,714	656	1,023	0	296	0	0	14,298
PR - D	16,498	21,208	12,708	14,759	6,861	9,829	3,208	905	0	152	86,128
PR-E	0	15,754	144	6,446	842	2,462	0	0	0	0	25,648
NRT Rockies	0	0	0	1,090	0	0	0	0	0	0	1,090
Unspecified	3,481	792	0	52	0	0	2,681	0	36	166	4,527
BC – PC	23,326	77,341	19,086	67,164	13,777	24,122	26,692	2,281	36	318	250,462
Grand Total Peace Country	413,232	349,446	319,342	265,098	127,910	126,067	100,353	35,867	4,422	2,169	1,738,672
Peace Country Other	Other farmland (e.g... other crops, livestock, summer fallow etc ...)										2,100,000
Percent of Canada	8%	7%	3%	9%	3%	6%	36%	3%	1%	1%	

Source: Statistics Canada – Small Crop Data Tables

For the last three decades the farmers of the Peace Country, like all farmers in Canada, have been witnessing the decline of small family farms, the demolition of community grain elevators (see Figure 1), and the abandonment of rail tracks. As national and international companies and governments negotiate, acquire, and direct the assets of agriculture and transportation services, the Canadian farmer, the most vulnerable in this matrix, must adhere to evolving rules, new procedures, and absorb the increasing costs to stay in the “business”.

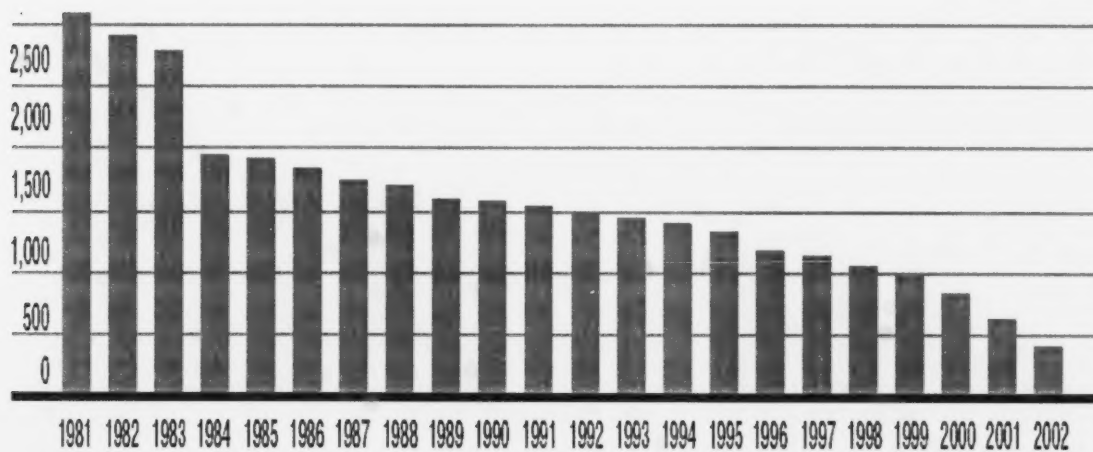


Figure 1: The Decline of Primary Grain Elevators in Western Canada.

Source: Canadian Agriculture at a Glance. Statistics Canada, Catalogue no. 96-325-XPB

Overall, farmers in Canada are a strong and reactive group. For example, for more than 100 years the flux in predictability of rail transport of bulk grains is met with uproar, appeals, and government interventions. Newspaper agricultural headlines of today oddly reflect the newspaper agricultural headlines of the 1930's, 1950's, and 1970's (see Figure 2). After each “apple cart overthrow, Canadian farmers go back to what they do best - seed and harvest food.

Canadian Farmer Issues

1902 - Farmers were fired up over the issue of rail car allocation. In the fall of 1902, the Canadian Pacific Railway (CPR), ignoring the producer loading rights provision in the Manitoba Grain Act (1900), continued to favor distributing its cars to elevators, rather than to the loading platforms and warehouses some farmers preferred to use.

1970 - The grain transportation system's inability to deliver the volumes of grain in demand in the 1970s led to major free-market reform of the system. The problems were essentially railway issues, but given the dependence every other system stakeholder has on the railway's ability to deliver on time – farmers, grain elevator companies and ports were all affected.

1998 – In 1998, The Estey Report stated that it had been impossible to come to any consensus with the various stakeholders – farmers, grain dealers, elevator companies, and railways.

Figure 2: Newspaper Articles – Canadian Farmer Issues with Rail Transportation of Bulk Grains

Source: History of Agriculture – Manitoba Museum

The unspoken costs of the proliferation of high-throughput elevators, the privatization of rail service, and the negotiation of “tit-for-tat” trade & marketing contracts between countries are increasingly absorbed by the Canadian farmer. While in the background, national and international conglomerates juggle their shareholder quarterly reports to ensure the “ghost” owners” reap their dividends. Representing only 5% of Canada’s farmlands, the Peace Country has little influence on these realities.

Branding the Peace Country is proposing an alternative approach for the Peace Country towards the “business” of agriculture under these new conditions. Instead of being reactive and frustrated, the Peace Country can collectively leverage off being the world’s most northern agricultural oasis. Representing only 5% of Canada’s farmland can be a marketing advantage (ie.. create a larger demand for the smaller supply). Being regionally isolated can be a marketing advantage (ie .. location is visually obvious on Canada’s agricultural maps).

Cropland in the Peace Country annually contributes an average of 2MMT (million metric tonnes) of principle food grains to Canada’s total production of over 50MMT. As shown in Table 2, 85% of this production occurs on the Alberta side of the Peace Country.

Table 2: Peace Country Grain Production – 2006

		Canadian Grain Commission Crops (Tonnes '000)					
Production Tonnes	Region	Canola	Wheat	Barley	Oats	Peas	Flax
	Peace Country- AB	693.1	823.7	341.5	212.2	91.5	4.9
	Peace Country - BC	63.5	35.1	24.1	25.0	2.3	0
	Total Production	756.6	858.8	365.6	237.2	93.8	4.9
Percent of Canada		8%	3%	4%	7%	3%	<1%

Sources: Alberta Agriculture and Rural Development & Small Crop Data Tables – Statistics Canada

Branding the Peace Country advocates that local agricultural farmland should be dedicated to crops that thrive under Peace Country growing conditions. Short season, robust, hardy crops that have been proven to have a significantly higher nutritional, bio-chemical, and/or growing advantage because of being grown in the Peace Country. Also, the Peace country needs to define the “advantage” for the crops grown in the Peace Country relevant to the buyer/consumer. A “best bang for buck” qualifier list needs to be created to select crops for highest yields and profits. Diversification of buyers needs to be increased (e.g. broker vs. processor; food vs. cosmetics; transcontinental vs. overseas). And a transport system that is specialty container based as opposed to rail bulk shipments needs to be coordinated. In other words, Canada’s Peace Country needs to become more “agri-business” focused not just “agri-production” and reactive to the pressures out of the control of the Region.

The Northern Growing Advantage

In 1997 MicroGro International trademarked the phrase "*Northern Vigor*TM" (see Figure 3).

TRADE-MARK: NORTHERN VIGOR

APPLICATION NUMBER: 0773410 **REGISTRATION NUMBER:** TMA468835

STATUS: REGISTERED **FILED:** 1995-01-23 **REGISTERED:** 1997-01-15

REGISTRANT: MICROGRO INTERNATIONAL RESEARCH INC., BOX 1090, BIGGAR, SK

Figure 3: Trademark Registration for the phrase *Northern Vigor*.

Source: Canadian Trademark Database

The trademarking of the phrase "Northern Vigor" by MIR began with research collected and a trademark application submitted by the Saskatchewan Seed Potato Growers Association (SSPGA). Founded upon years of research collection (in partnership with the University of Saskatchewan), SSPGA claimed that because of its northern "toughness training" the yield and hardiness of Saskatchewan seed potatoes surpassed national and international competitors. Leveraging off this northern advantage research, the SSPGA launched a major information campaign comparing Saskatchewan production to production reaped from its competitors (see Figure 4). The key points here being that the SSPGA defined their growing advantage, had research to back them up, and aggressively campaigned to the needs of the buyer. The SSPGA campaign also increased production rates and land dedicated by local farmers as the demand for Saskatchewan seed potatoes from national and international buyers skyrocketed (see Figure 5).

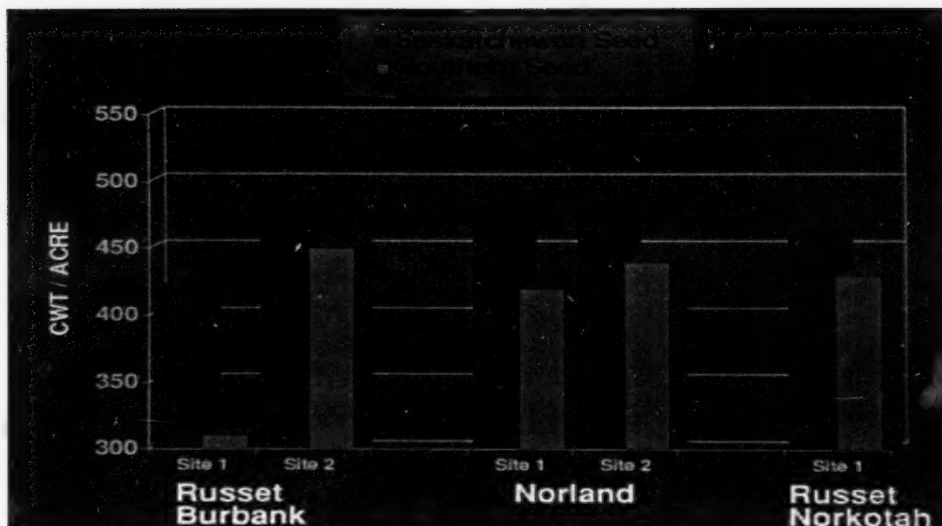


Figure 4: Yield comparison of Saskatchewan Seed Potatoes to southern Seed Potatoes

Source: Saskatchewan Seed Potato Growers Association

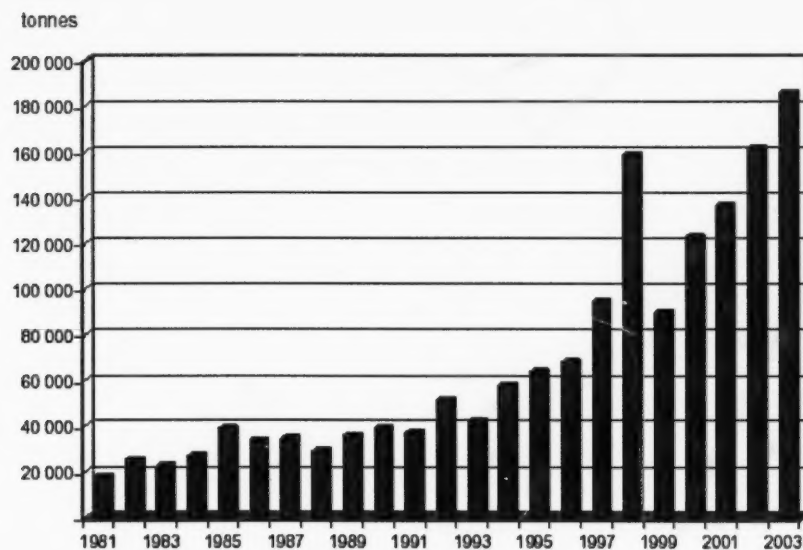


Figure 5: Saskatchewan Seed Potato Production 1981 – 2003

Source: Saskatchewan Seed Potato Growers Association

Surprisingly, and to the potential advantage of the Peace Country, the majority of the agricultural production (potatoes included) in Saskatchewan is significantly below the 55th parallel, the Canadian Government definition of “Northern” under the Northern Resident’s Deductions Allowance (Zones A and B). As shown in [Figure 6](#), Canada’s Peace Country is far more positioned to claim “northern vigor” for agricultural products than Saskatchewan. Yet Saskatchewan has turned their northern Canadian growing conditions into an advantage. Quality is defined and marketed to the needs of niche market buyers.

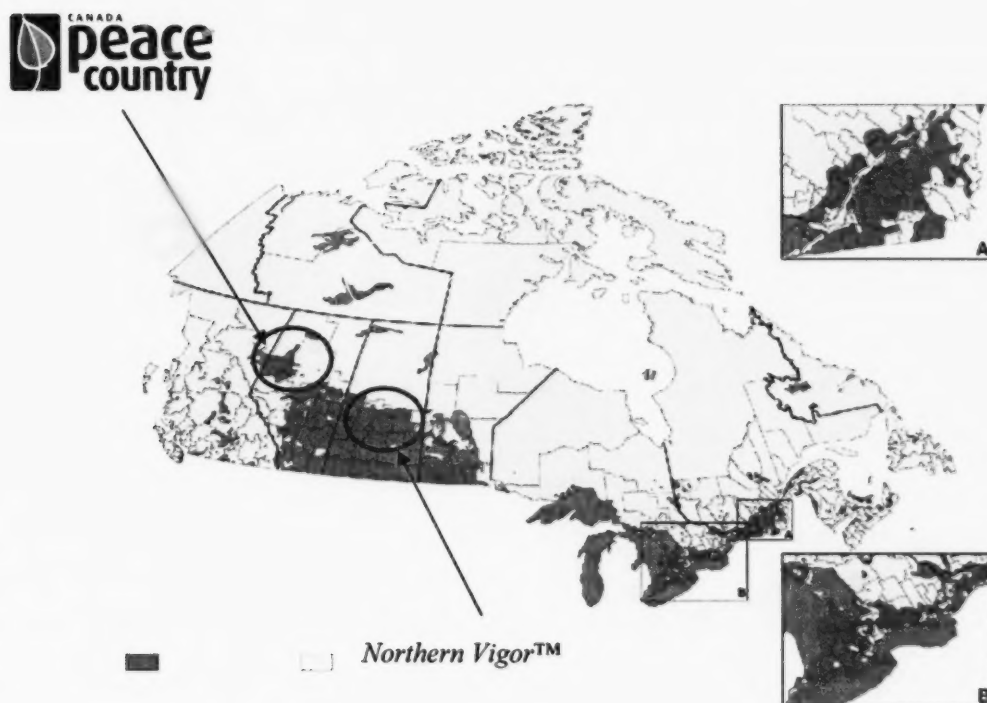


Figure 6: Geographic zone of Northern Vigor™ compared to location of the Peace Country.

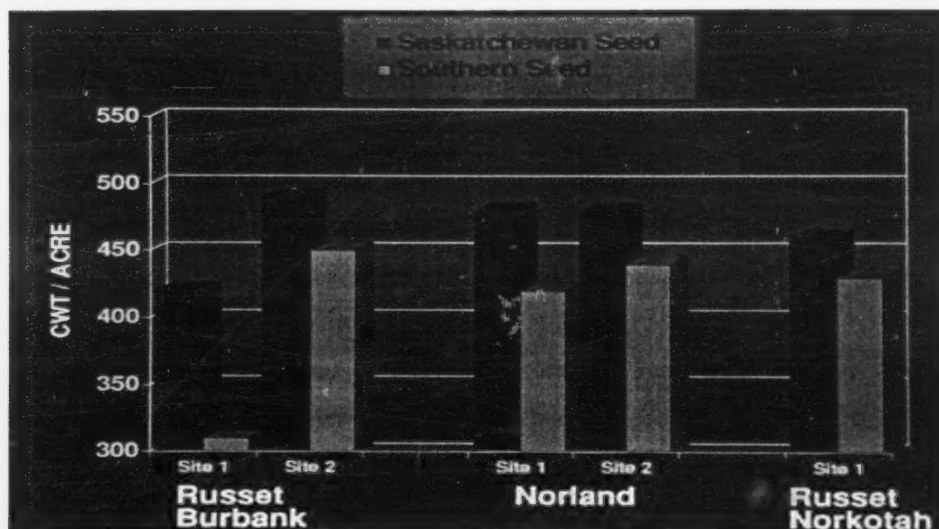


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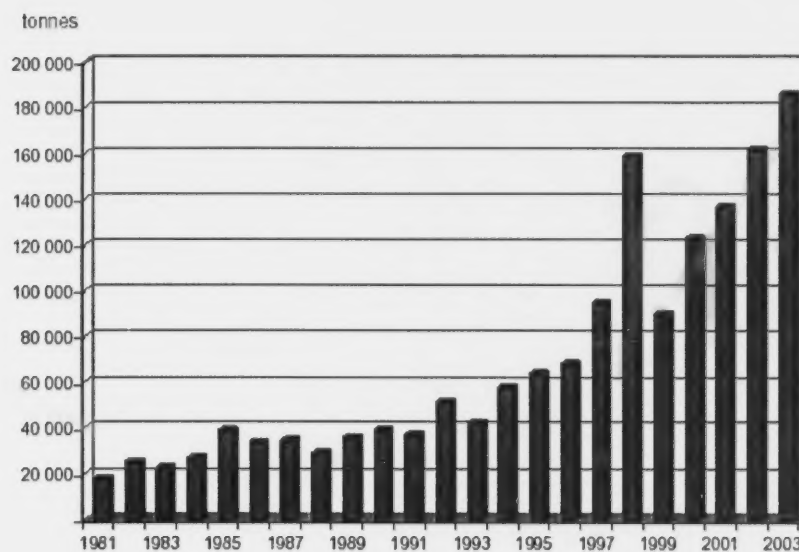


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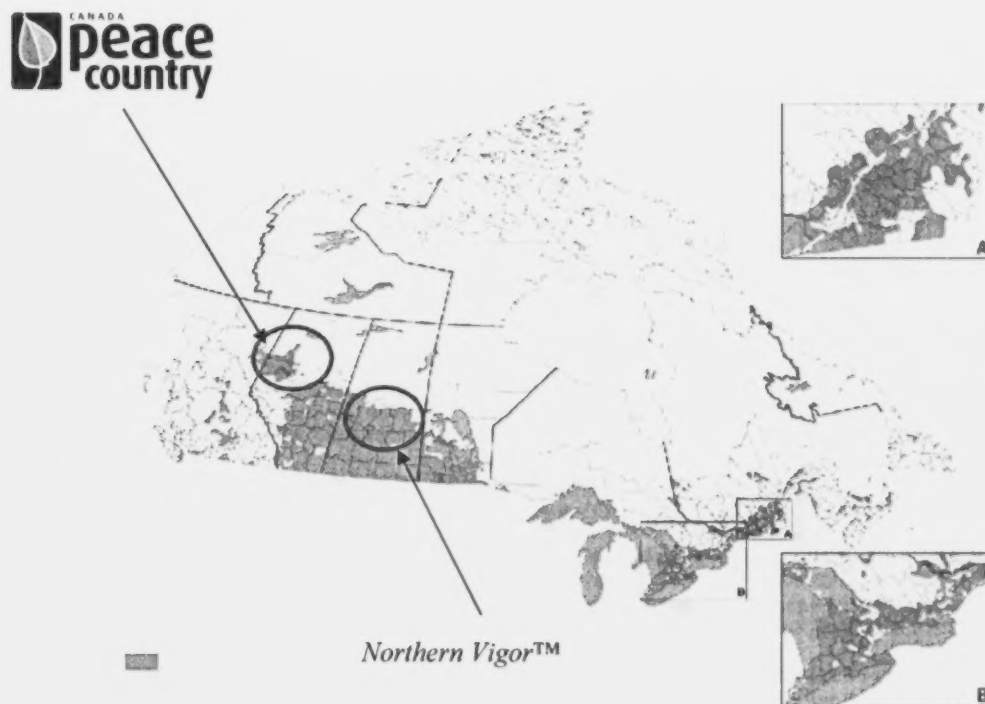


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Defining Quality

In order for the Peace Country to truly take advantage of its northern agricultural oasis, the Region needs to invest in comparative bio/chemical research that defines what is meant by "quality" for its agricultural products. For each agricultural commodity the definition of quality will be different and also buyer dependent.

For example, the creeping red fescue (grass seed) grown in the Peace Country is internationally renowned for its high germination rates. To a buyer, this could be a huge motivator to pay premium price for these seeds; especially if the buyer maintains 100s of yards of turfgrass for sports fields or golf greens (input provided by - Rycroft Seed Cleaning Co-op). Not only is the Peace Country internationally renowned for its` high quality creeping red fescue; the Peace Country is also the world's largest producer! Note however, that international corporations that purchase these seeds wholesale have no reason to advertise "Peace Country grown" on its consumer packaged products.

Creeping red fescue is a major crop grown for seed in the Peace Country region of Alberta and British Columbia. Annually, 1000 to 1200 growers will harvest between 80,000 and 120,000 acres of creeping red fescue for seed. Annual seed production varies between 35 and 40 million pounds. Annual export sales of creeping red fescue are between \$28Cdn to \$30Cdn million.

Creeping red fescue is primarily grown for use in the turf grass industry, going into lawn mixes with other turf grass species such as perennial ryegrass and Kentucky bluegrass. It is used in grass mixtures for seeding lawns, golf fairways, pastures, and for soil conservation purposes.

The majority of creeping red fescue seed produced is exported.

**The Peace Country is the
world's largest producing area of creeping red fescue seed.**

Source: Alberta Agriculture and Rural Development

Timothy hay grown in the Peace Country has been shown to have higher sugar content than its national competitors (Figure 7). This has become an important feature in the competitive Japanese markets that will pay premium price for Peace Country timothy hay. Why? Because Japanese farmers have noticed that their dairy cows prefer the sweeter timothy hay from the Peace Country. Linking this observation to increased milk production and being able to substantiate this link would further increase the security of Peace Country timothy hay producers in the competitive Asian market. Why, because more milk means higher rates of return on the feed dollar for the farmer (input provided by Enterprises Macay– St. Isidore, AB).

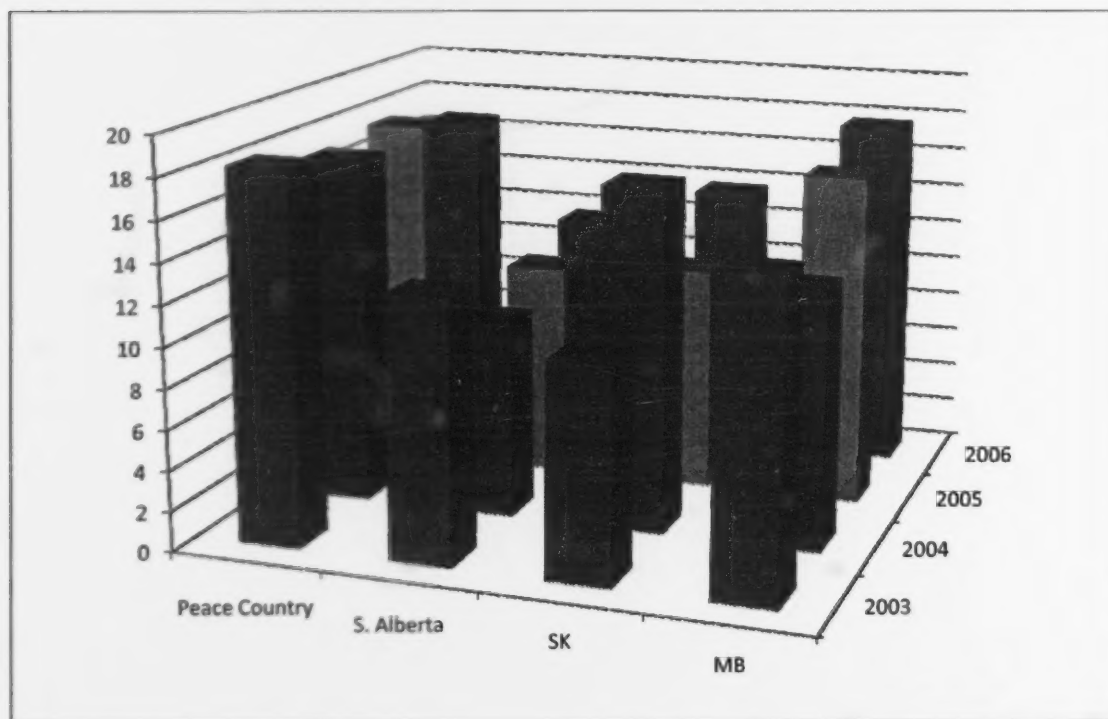


Figure 7: Comparative Analysis of Sugar Content in Timothy Hay - Percent

Source: Mark Lavoie – Enterprises Macay - St. Isidore, AB

Recently released research findings by BPCA; conducted in partnership with the Alberta Research Council; indicate Peace Country flax has superior levels of Omega 3's (see Figure 8).

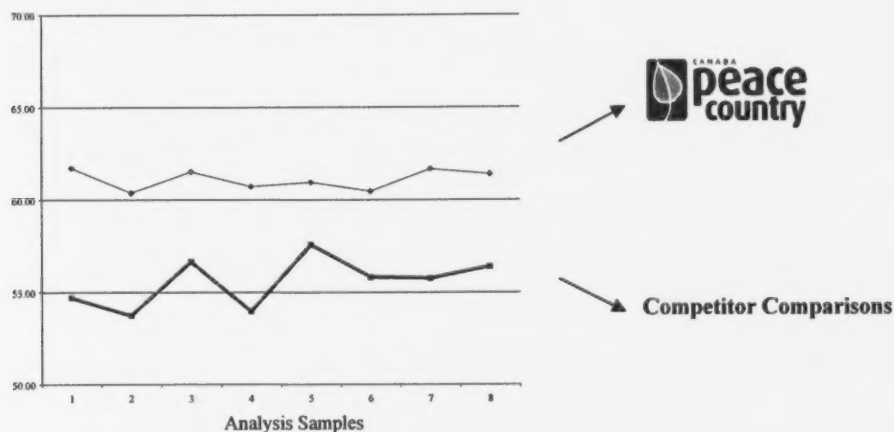


Figure 8 – Comparative Analysis of Alpha-Linolenic Acid (Omega3) in Flax

Source: Alberta Research Council - Peace Country Initiative - Report 1- 2009

Markets for Flax

Flax as a Food Because of its link to good health, flax is fast becoming a new food in many diets. Bakers and commercial food companies use flax as a unique ingredient in everything from yeast breads, to bagels and cookie mixes. Not only do muffins and breads baked with flax taste great, but studies also find that these foods provide health benefits. Omega-3 enriched eggs from hens fed rations containing flax are also very popular. These eggs contain eight to 10 times more omega-3 fatty acids than regular eggs. Two of the enriched eggs supply more than half Health Canada's recommended daily intake of omega-3s for adult men and women. Other omega-3 nutritionally-enhanced foods in the marketplace include milk, margarines and yogurts.

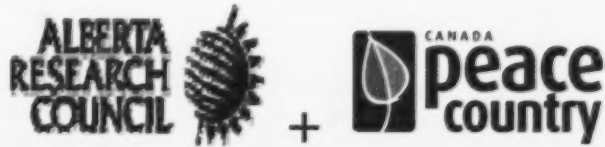
Industrial Uses of Flax: In use for ages, flax's natural quality and superior performance make it an important part of many products we use today. Flax is environmentally friendly. It makes coatings and floorings friendlier, concretes tougher, and fiber products stronger. Flax oil (linseed) products help manufacturers maintain good air quality, providing modern solutions to protect and beautify our world. Manufacturers today are turning to new flax oil products such as Dilulin™ in paint products, and Archer #1™, a co-adhesive in popular fiberboard. These products replace some solvents and petroleum-based chemicals in the products' formulations, thereby combating air pollution. In many places, environmental regulations call for the reduction of dangerous volatile organic compounds (VOCs) which solvents spew into the air, interacting with sunshine and creating smog.

Did You Know!

Linoleum flooring contains 30% flax oil.

Developing the Research Series

With clarity of direction and purpose, over the next five years, BPCA is proposing to select a minimum of two agricultural commodities per year to identify the unique growing advantages in comparison to provincial, national, and international competitors. To lay the foundation for this undertaking, in 2008 Branding the Peace Country signed a research partnership with the Alberta Research Council – Life Sciences Division. The research team assigned to the Peace Country under this agreement is spearheaded by internationally renowned bio-genetic scientist, Dr. Jian Zhang.



The Peace Country Research Initiative

In partnership with Dr. Zhang's team of research scientists, two questions will lead the bio-analysis of each agricultural commodity selected for this project: 1) "What is its unique northern quality?" and 2) "What potential markets would pay premium price for this commodity because of this quality". The commodities selected for inclusion in the research series will have one or more of a pre-identified nutritional, chemical, or growing superiority that is of high value to consumers and/or global commodity buyers. Our first directive on which commodities to consider comes from the collective wisdom of generations of farming in the Peace Country. With just one year off the block, Branding the Peace Country has already identified seven agricultural commodities that are worthy of a closer inspection - alfalfa, oats, saskatoons, canola, honey, flax, and dry field peas!

Funding under the *Peace Country Research Initiative* will be on a matched grant model, with Branding the Peace Country's partners (see <http://www.canadapeacecountry.com>) and the Alberta Research Council contributing to the cost of each comparative bio-analysis research project.

2009-2010 Confirmed Research Project

Bio-analysis of Medicinal Protein Levels in Peace Country Alfalfa

Is There a Peace Country Northern Growing Advantage?

Sponsored By

Northern Alberta Development Council

Medicinal Proteins in Peace Country Alfalfa: Alfalfa has been a cultivated plant for centuries. Originating somewhere in the Persian (Iran-Iraq-Saudi) region, its reputation as a nutritious animal fodder spread far and wide. A member of the legume family, Alfalfa is rich in the vitamins A, D, and K, and contains a high percentage of protein (higher than corn and wheat), for these reasons alfalfa has long been used as a forage crop to feed livestock such as cattle and horses. Recently Alfalfa has been identified in a new market; the pharmacotherapy market.

Niche Market Potential

The addiction pharmacotherapy market is currently worth only about \$2 billion, reports the research firm *Spectra Intelligence*. The market is expected to grow to \$3 billion by 2012, fueled by increased need, mounting health care and socioeconomic burdens in the hundreds of millions of dollars, and new products that will add sales and offer proof-of-principle. After several years of preclinical work, Medicago, a pharmaceutical research company, is researching an alfalfa based solution to rehab patients, especially in methamphetamine cases where patients often have very high levels of the drug in their bodies and large amounts of antibody will be needed. As noted by Medicago, "It's important to detoxify patients proactively in the emergency room, because for example, the problem with methamphetamine is that it binds permanently to receptors in the brain and destroys them. Long term, methamphetamine use alters activity in the dopamine systems associated with motor control and verbal learning, as well as affecting areas of the brain connected to emotion and memory.

Alfalfa based nutraceuticals have been found to counteract this binding effect!

2009-2010 Proposed Research Project

Bio-Analysis of Magnesium Levels in Peace Country Saskatoon Berries

Is There a Peace Country Northern Growing Advantage?

Sponsor – Unidentified to Date

Magnesium Levels in Peace Country Saskatoon Berries: Saskatoon berries (*Amelanchier alnifolia* Nutt.) are purplish-blue berries that are both native and cultivated in the Peace Country. An excellent source of Vitamin A and Vitamin C, the composition of the Saskatoon berry is often compared to that of the blueberry, which has had strong market appeal and marketplace success. The Saskatoon berry however, has nutritional properties that are significantly higher in protein, fat, fiber, calcium, and magnesium than the blueberry.

Niche Market Potential

Magnesium is the fourth most abundant mineral in the body and is essential to good health. Approximately 50% of total body magnesium is found in bone. Magnesium is needed for more than 300 biochemical reactions in the body. It helps maintain normal muscle and nerve function, keeps heart rhythm steady, supports a healthy immune system, and keeps bones strong. There is an increased interest in the role of magnesium in preventing and managing disorders such as hypertension, cardiovascular disease, diabetes, osteoporosis and ADHD. Observations of reduced dietary magnesium intake in modern Western countries as compared to earlier generations may be related to food refining and modern fertilizers which contain no magnesium.

A plant based source of magnesium that is marketed for mulching into fertilizers would be in high demand on the international markets.

Branding the Peace Country Association

Focused Direction

Strategic Actions

Issues and opportunities that have presented to Branding the Peace Country Association over the last three years have helped to clarify its unique contribution to Peace Country agriculture. With this clarity of purpose, Branding the Peace Country; in partnership with regional economic development agencies, municipalities, and government supporters; intends to initiate and coordinate over \$500,000 worth of comparative bio-analysis research relevant to Peace Country agriculture over the next five years. Why? Because the Peace Country does produce superior agricultural products and Peace Country farmers should be able to negotiate premium prices because of it. Repeated from the introduction in this report, it's not just prices that these research series reports are intended to effect.

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Branding the Peace Country Association is a unified voice that is dedicated to proving the Peace Country's northern growing advantages to the benefit of, and the advocacy for the Region's agricultural industry.

We just don't think we grow the best ... we're out to prove it!

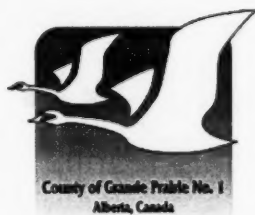
For more information please contact:

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2009/2010

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the Branding
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South Peace Economic
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